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ABSTRACT

This paper examines ways in which university extension programs can become more customer-focused in the courses and services that they deliver, focusing on the experiences of the University of California Extension, Santa Cruz. Extension programs can increase their effectiveness by: (1) establishing partnerships with other service organizations, such as the chamber of commerce or unemployment agencies; (2) creating alliances with the business community, both locally and internationally; and (3) creating a customer focus with participants in Extension programs, making individuals feel that they have received value for their time, energy, and money. Extension programs also need to focus on effective public relations and community outreach to ensure the success of their activities. (MDM)

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University to Community and Back: Creating a Customer Focused Process

Tara Martin-Milius

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University to Community and Back:
Creating a Customer Focused Process

Tara Martin-Milius

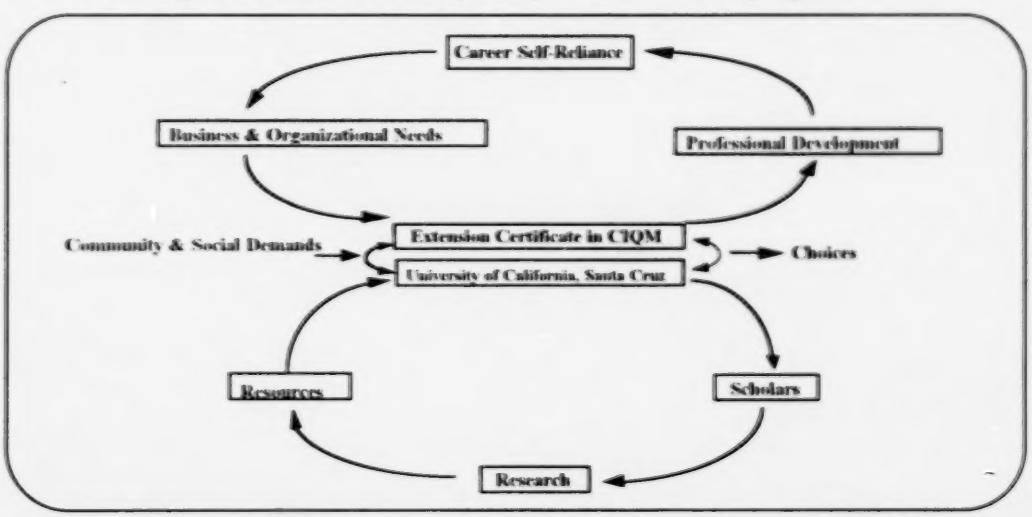
In an era of change, Colleges and Universities are responding to new needs and requirements in the community. From the traditional role of the academic environment, research and education, our educational institutions are answering many of these new community demands through extension programs. These programs encompass broad based management and skills enhancement such as Total Quality Management, Training, Marketing; technical skills related to new technologies, computers, networks; and personal growth and development skills such as photography, wine-tasting, which are not a traditional part of an academic program. Here we will explore a few of the elements involved in the UC Extension, Santa Cruz, and its quest to serve its diverse customer base.

In California's Silicon Valley environment, there is a wide variety of tastes, a high level of education, an abundance of technology in every day use, and a pace that only a few other areas maintain. The demand from participants in Extension programs is for short time-frame courses which fit their individual needs and programs which can be woven in between organizational, family, and social demands. The business community insists that its employees and potential employees be trained in the skills and concepts which are revitalizing the economy, and those which directly serve the needs of the organization.

There are also public service and non-profit organizations such as Career Action Center, the Chamber of Commerce, recruiting organizations, and temporary agencies, which serve the community. In one aspect of their activities, these agencies and companies strive to define business needs and trends of individual skills. This helps develop the skills needed, individually and in corporations, for successfully positioning or re-positioning themselves in the job market. In creating alliances with these organizations and others, the University has encompassed many of the new demands from the community in a systemic way. Extension serves this community by retaining and serving the traditional role of the University and by expanding to meet the new an different demands from its various constituencies.

This discussion will focus on three major areas in which Extension is creating a more customer -focused organization, as listed and illustrated below:

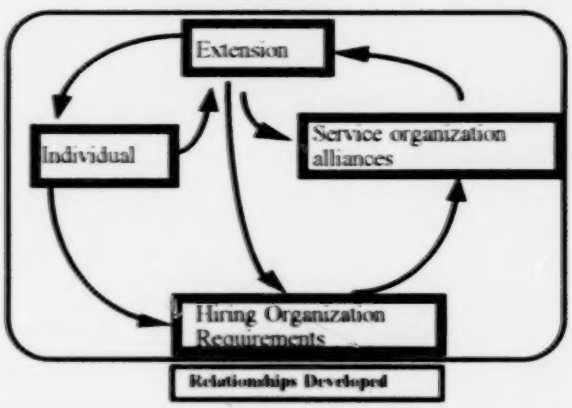
- Partnering with other service organizations
- Creating alliances with the business community here and abroad
- Creating a customer focus with participants in Extension programs



University of California Extension, Santa Cruz serves Silicon Valley, Santa Cruz, and Monterey. Because Silicon Valley is its largest customer base, Extension is centrally located for easy access from most of the Valley. Courses are offered in other locations, but the bulk of the classes are in the Santa Clara location.

All of California is affected by down sizing of large companies, but Silicon Valley in particular, is strongly affected because of the concentration of businesses. As the Valley is affected, so is Extension, whose population is largely working professionals. These professionals in transition are an increasing part of Extension participants. Some are self-funded, some are funded through the organizations they are leaving, some are funded through other public/private agencies. If self-funded, Extension must offer value for people to spend for courses in such uncertain times. If funded through organizations, Extension must meet their criteria for adding value through the retraining. This ensures that Extension provides services from which professionals at all levels can benefit.

Extension has developed relationships with organizations including the Employment Development Department; NOVA, a government and private industry venture; the Career Action Center, and others. These organizations support individuals in achieving their career goals in a variety of ways, including education and training. Extension provides expanded services for these organizations by providing training, and through serving the mutual needs of the service organization and the individual, Extension expands its customer base.



The interesting thing about the expanded customer base is that Extension then has an opportunity to develop an on-going relationship with a customer which came from a referral from another organization. That referral can lead to others if the customer is not just satisfied, but more than satisfied with the interaction. The following story is an example of what has happened for Extension program participants.

> *RJ had been laid off. He was referred to Extension by NOVA and Experience Unlimited to explore possible career alternatives to Aerospace. After discussion some potential career opportunities with one of the Coordinators, he took the Certificate Program in Continuous Improvement and Quality Management. Through networking, a part of our Quality process in the classroom, he was able to obtain a higher paying position.*

Because of its close association with the business community, its membership in the Chamber of Commerce, its activities with Joint Venture Silicon Valley, and the career service organizations, the needs of individuals associated with the Chamber, Joint Venture, and Career organizations are closely matched. This match between needed services and education and training supplied by Extension opens doors for job opportunities. Successful employees further increase beneficial interactions between the organization and Extension.

The increased interaction with organizations increases the strength of Extension connections with hiring companies. This creates not only customer satisfaction but customer loyalty with the Extension program participant and the hiring organization. It is through this loyalty that referrals flow so Extension increases its opportunities and prospers.

The Valley is rich in information and programs from educational institutions, private training organizations, even training organizations linked to major companies, such as Workforce Solutions, an IBM company. All these programs are good, so being merely *good* is not good enough. We must be excellent.

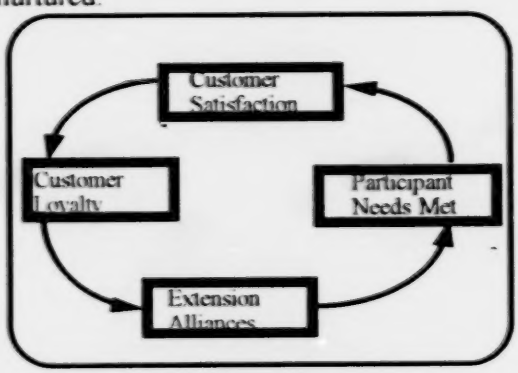
Excellence must be imbedded in all the systems of Extension, so the process of receiving services from Extension is superior for the recipient. That excellence must be maintained in every contact with the customer: every marketing piece, every phone contact, every personal contact, every activity from inquiry to execution for Extension to remain competitive in this environment.

It is not acceptable if credit cards cannot be used to pay for classes.
It is not acceptable for calls to be routed several places for information.
It is not acceptable for classrooms to be uncomfortable.

The only thing that is acceptable is if the customer has a good feeling about Extension when any transaction is completed. "Good feeling" translates into something like this:

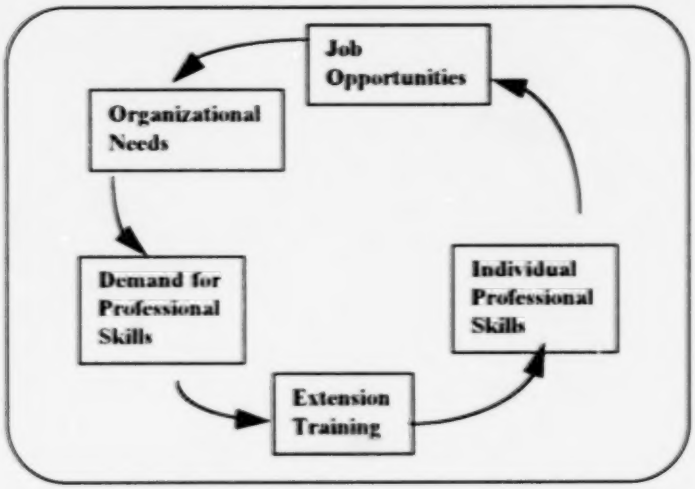
Make me feel good.
Make me feel important.
Make me feel my contact with Extension is worth my time and money.

When individuals dealing with Extension feel they have received value for their time, energy or money, then customer loyalty to Extension and an on-going, mutually beneficial relationship begins to develop. It is from satisfied individuals and organizations that referrals, references, and increased invitations for more services stem. These referrals are the cream, the icing for Extension, because they have not had the marketing energy spent on developing them. They do, however, have to be nurtured.



Results of Customer Focus

When Extension links with other organizations, and provides training for individuals to meet both organizational and individual needs, job opportunities open. When organizations are happy with the skills and expertise of employees hired, they will continue to work with Extension. When employees are pleased with the skills they acquire from Extension, they will continue to refer people to extension, either individually as personal contacts, or in groups through contract training.



If we are successful in satisfying all the needs of the customer, and we provide a service which induces our customer to do business with Extension and only Extension, we have results like this little story.

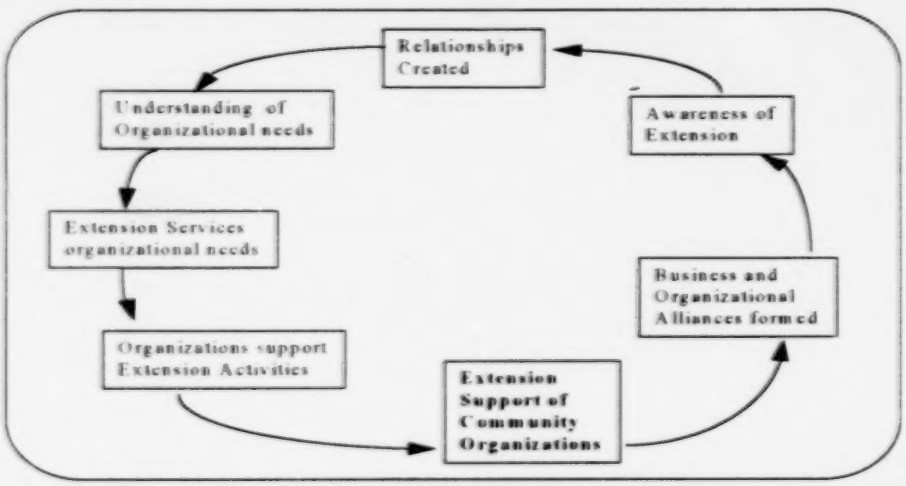
> *Marty, a training manager at a local high-tech company, calls the Contract Training Director to arrange for four sessions of the same class, IF Extension can provide them. Marty knows the content will be as good, if not better, than other training organizations. The instructor at a minimum will be competent, excellent, at best. She calls no one else for bids, even though other local organizations offer the specific course she needs.*

The services we offer must match the needs of the community for Extension to remain viable. The process of obtaining those services, to paraphrase Rosabeth Moss Kanter, must also be fast, friendly, flexible, and if at all possible, fun. Bill Bleuel, of Pepperdine University suggests that for an organization to gain customer loyalty the following four conditions must be met:

- the relationship established must be a positive, mutually beneficial, and on-going
- the relationship must be interactive
- the customer must be emotionally engaged
- the customer and company feel an allegiance to each other

If these conditions are met, then the relationship *begins* to build toward customer loyalty. The challenge is to operationalize these conditions and disperse them through Extension systems. Corrective action does not then rely solely on the expertise of key individuals, it has been embedded and standardized in the system itself.

We have discussed in part, the relationships Extension is building with career services organization to serve the needs of the individual and then hiring organizations, but not how Extension can further broaden its customer base. Extension has not only joined such organizations as the Chamber of Commerce, NOVA, the Career Action Center, but has also played an active role in promoting common goals. Since serving community needs and enhancing economic stability are some common goals, it is natural for Extension to promote them. Interactive, ongoing, and mutually beneficial relationships have been developed. Through alliances with these organizations Extension becomes better known. Through working with the organizations, needs are discovered, relationships begin to form, and Extension representatives begin to understand how Extension might support community needs through its services, as shown below.



CAC and Extension jointly presented a Career Fair, attended by over 400 participants who had free access to career counselling presented by people in various industry segments and, received information on educational opportunities. Both CAC and Extension gained customers neither had had previously.

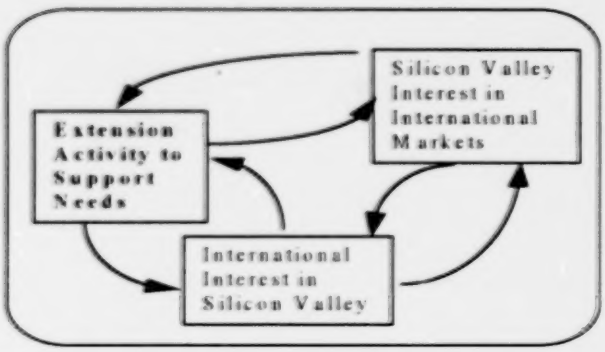
Not only does this joint venture require some specific values, but also the knowledge and communication skills to make the activities productive. Some of the values demonstrated through this joint activity are: collaboration, customer focus, win-win belief systems, integrity, honesty, willingness to hear and acknowledge other positions. Some of these values are particularly difficult to model within systems which drive competitive behaviors, as the traditional hierarchical and departmental structures.

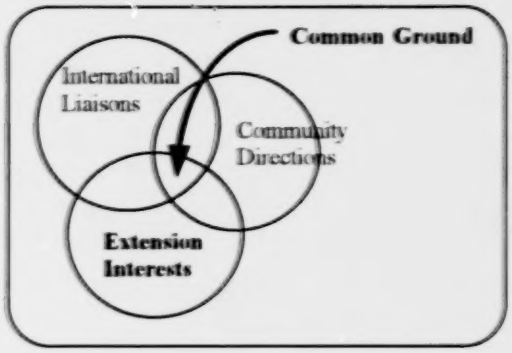
Some of the challenges inherent in organizational outreach process involved creating a communications systems which informs others in the Extension environment what is being done in the community:

- How to achieve external communications systems with a multiplicity of community contacts.
- How to feed internal activities and responses fed back to the community liaison people.
- What internal Extension people need to know to achieve mutual community goals.
- How to create and maintain an effective internal system which supports the goals of both Extension and other community members.

The challenges multiply when Extension reaches out to the international community. Quite naturally, people come to UC and to Silicon Valley as exemplars of leading edge activities and to UC as a local institution which has international *cachet*. In some cases, attending a course at Extension has been justification for an international trip to explore opportunities. In other cases, the courses and programs offered by Extension are the specific attraction.

In the case of international liaisons, it is not only connections in the international community and the interests of Silicon Valley organizations which drive Extension activities, but also the desire of Extension itself to be internationally involved. However, even a congruence of goals does not mean agreement is automatic. The challenge is to discover where Extension interests intersect with international audiences and community directions. Part of Extension's process is discovering and developing common ground with local and international communities.


Extension Activity to Support Needs
Silicon Valley Interest in International Markets
International Interest in Silicon Valley



LW is from China and she hosted a group of Chinese Ethnic Leaders visiting the US. Through her collaboration with another business which also was associated with Extension, the activity was planned. Some of the Chinese leaders were very interested in the possibility of sending people to attend Extension courses. Not only would they learn about solving some of the issues they face, but would also have the opportunity to build relationships with Silicon Valley businesses which might contract with them for necessary goods and services. These groups are often poor in money and technology, but rich in other possibilities for resources and trade. Many barriers in the form of 'red tape' exist to creating business opportunities.

In dealing with business and international organizations, it is easy to see them as customers. Relationships among Extension's Continuous Improvement and Quality Management participants and Extension representatives are not always as clearly framed. Those who represent Extension are not only the instructors, but also the front line people who answer the phones, handle inquiries, and deal with the information desks. Therefore, each contact with any representative of Extension becomes an opportunity to build customer loyalty, or at least customer satisfaction.

It is important to remember each contact, from the phone, to the information desk, to the instructor, represents a connection with a distinct department of Extension. Each department has its own rules and regulations, and its own requirements for providing and receiving information. Each has expectations of its employees. Meeting departmental expectations and providing information to a single participant is not always congruent with what is needed for service excellence. Service excellence must remain paramount.

University to Community and Back

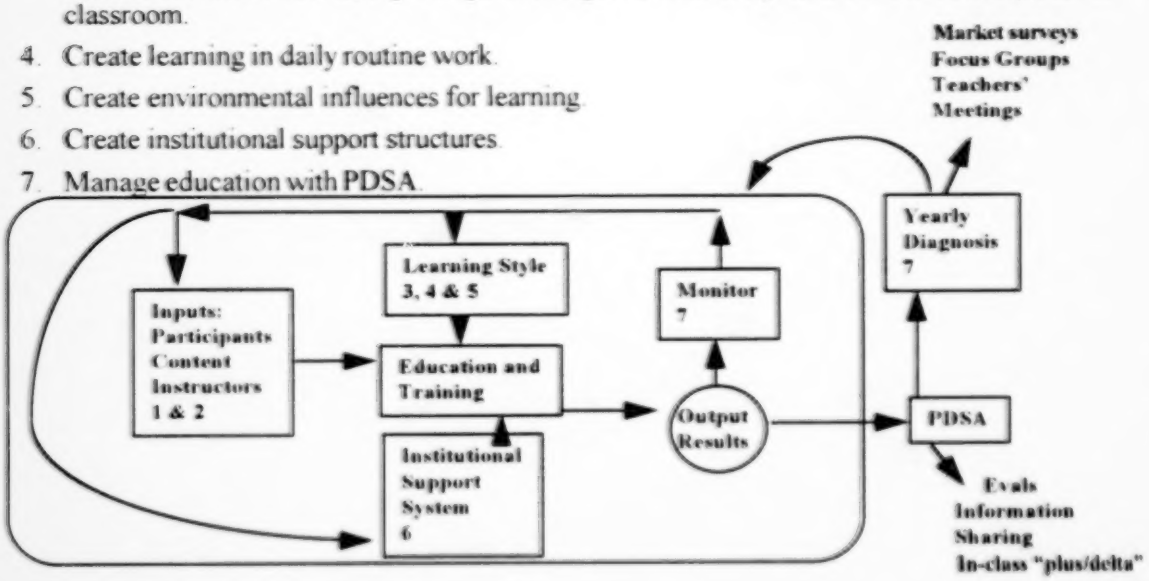
In the classroom, all the instructors of the Continuous Improvement and Quality Management program model customer-focused instructional methods. From the framing of the content of the class in terms of what expectations are, to providing in-process feedback for things that are not going as expected, instructors use quality tools to focus on the participant as a customer. Feedback has included everything from using more service-related examples, to the types of directions provided for exercises as well as room maintenance issues. Response to the feedback has been prompt, and well-received by the classes. Not everything brought up can be addressed within the time frame of the class. However, the acknowledgement of issues such as noisy ventilation fans will help relieve frustrations. Participants need to feel heard even if the problem cannot be corrected. Since our CIQM program embraces the value of customer focus, it is essential for the credibility of Extension and the certificate program to model that behavior.

When a participant in any Extension program drives into the parking lot, their judgement of Extension and their willingness to spend time and money there has begun. It is imperative that the contact the customer has as she or he walks in the door be fast and friendly. To the person who is unfamiliar with the environment, the signs mean nothing. They are being bombarded with other sensory data, and are looking for a friendly face to ask directions. First impressions are crucial.

To the person who is calling for information about a course or grade, the fact that the person answering the phone is not the 'right' department means nothing. They want answers now. The last thing they want is to hear why it is not the job of the person answering the phone to answer their question. Extension strives to model quality skills from first contact to final evaluation.

In *A New American TQM (pg. 349)*, Shiba describes a system for teaching Total Quality Management. I have tailored that plan here, without changing the basic tenets:

1. Plan Inputs to training to reduce variance of output--once you define the outputs that is essential (During the process of defining outputs, maximizing the possibilities is fundamental).
2. Don't use educational professionals to teach. Use people who are intimately familiar with the work and teach them to teach. This depends on the environment. UC requires both the academic credentials as well as experience in the field
3. Use mutual learning, not traditional student-teacher roles. This is particularly true in Extension where our CIQM participants bring a wealth of experience and knowledge to the classroom.
4. Create learning in daily routine work.
5. Create environmental influences for learning.
6. Create institutional support structures.
7. Manage education with PDSA.



In Extension's CIQM Certificate Program, we are striving to put systems in place which will drive behaviors that model what we teach, train, and believe. Despite differences in departments, employees and contractors, we are all trying to resolve any issues which interfere with Extension's ability to satisfy and delight its customers.

From the classroom to the workplace, we are on a journey which yields tremendous rewards. Some of those rewards are the continued and increasing enrollments in the program. Some of the rewards are when other departments, people, or groups adopt some of the methods to deliver satisfaction to the customer. In other cases, the rewards come from seeing the progress of the participants as they implement what they have learned, are successful beyond their expectations, and are recognized for their achievements.

There is no perfect blueprint for action. It is necessary for all our educational institutions to continue to deliver the services they have always delivered. Those institutions must, however, deliver them more efficiently and effectively. In addition, institutions such as Extension must increase services and define new directions based on the fresh linkages forged within the community and in the international arena. To achieve this it will take all the skills, knowledge and talents of everyone associated with Extension. The world is changing quickly, and we must respond quickly so that we can continue to prosper in this increasingly complex environment.

"University to Community and Back:
Creating a Customer Focused Process"

Reading and References:

- Shiba, Shoji, et al. **A New American TQM: Four Practical Revolutions in Management**. Productivity Press: Portland, OR. 1993.
- Beer, Stafford. **Diagnosing the System for Organizations.** John Wiley & Sons: NY, 1985.

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- Nancy Brown, Director of Businesss and Management, UC Extension, for accuracy within Extension activities

Speaker Biography: Tara Martin-Milius...

Dynamic speaker, trainer, and consultant, Tara Martin-Milius has an extensive background, including: quality processes, organizational development, professional facilitation, manufacturing, service, and materials. She is active in a number of professional associations, including ASQC (American Society for Quality Control), ASTD (American Society for Training and Development), National Speakers Association, and Organization Development Network. In addition to her training and consulting activities, she speaks and presents at conferences, retreats, and professional organizations.

Tara Martin-Milius has been a manager in large, small, entrepreneurial, and bureaucratic environments in healthcare and high technology organizations. She has led management and executive retreats, facilitated diverse groups and taught a great variety of courses in organizations, from facilitation, quality, and communications to stress management. Her company, Center for Corporate Learning, focuses on Quality, Management Communications, and Diversity. She is also the Coordinator for the Certificate in Continuous Improvement and Quality Management at UC Extension, Santa Cruz, serving Silicon Valley.

Published in the areas of diversity and quality, Ms. Martin-Milius has done research in the areas of gender issues, learning effectiveness and retention. She is a Certified Production and Inventory Manager through the American Production and Inventory Control Society (APICS). She holds a Bachelor's in Business, and a Master's in Organizational Development from University of San Francisco.